

INTERNATIONAL MARKET FOCUS

MEXICO

Travellers from Mexico stay approximately 15 nights in Ontario and spend an estimated \$1,900 per trip.¹

MARKET POTENTIAL FOR ONTARIO

111K¹	\$211.3M¹	147%¹	59%¹	1.1M²	DIRECT FLIGHTS
Visitors from Mexico	Visitor Expenditures	3-year Visitor Growth	YoY Visitor Growth	Expressed an interest to visit Ontario in the next 2 years	To Ontario from Mexico City, Guadalajara, Cancun, Monterrey and Cozumel

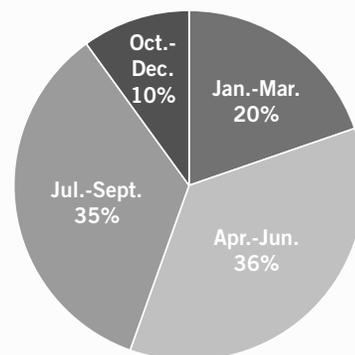
IMPACT OF DESTINATION ONTARIO'S WORK IN 2017/18³

9.4K Incremental Trips to Ontario Generated	241.5K Web Visits	\$1.9M In Earned Media
\$7M In Direct Incremental Visitor Expenditures	1.3K Campaign Leads	
140 Travel Company Representatives Trained on Ontario Products	2.4M Social Media Reach	
3 New Ontario Trip Itineraries Developed		

TRAVELLER INSIGHTS

62%² of travellers visited Canada as part of an organized group tour	59%² of travellers used a travel company during their most recent long-haul trip
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TRAVEL TO ONTARIO BY SEASON¹



PRE-TRAVEL

Travel guidebooks, TV programs and films featuring the destination are among the top 5 information and inspiration sources for people planning to travel	The younger population (18-34 years) dominate long-haul travel
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DURING TRAVEL

TOP INTERESTS TO THE TRAVELLER

Trying Local Food and Drink Food is an important part of Mexican culture	Natural Attractions Niagara Falls is popular. Nature experiences like provincial parks within driving distance to cities are preferred	Vibrant Cities Prefer to live large in trendy cities
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WHAT WE KNOW

- Travellers from Mexico are proud of their experiences and look for authentic Canadian experiences to share
- Shopping is extremely important
- While Spanish language services are still important, younger travellers are often fluent in English
- Travellers from Mexico have their meals much later in the day than the Canadian norm
- Travellers from Mexico like touring around to multiple destinations and look for intellectually stimulating travel experiences
- Appreciate Canada's reputation of being a friendly, safe and welcoming destination
- Prefer flexible itineraries that are not heavily structured

Sources: 1. International Travel Survey 2016 | 2. Global Tourism Watch 2017 | 3. Destination Ontario 2017-18 Annual Report

PLANNED ACTIVITIES FOR 2018/19



DESTINATION ONTARIO'S MARKET STRATEGY

- In 2017, more Mexican travellers said they will increase long-haul travel spending. Given Canada's positive sentiment in the Mexican market, there is an opportunity for Ontario to increase the potential market size in Mexico.
- Promote Toronto, Niagara and Ottawa and continue introducing new areas with export-ready products such as Blue Mountain, Muskoka and the Rideau Canal (including introduction of new products by trade)
- Focus on off-peak season travel

AREAS OF EMPHASIS

Cool cities with diverse, niche experiences	Warmth and openness	Combines both local culture and outdoor experiences
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CONSUMER MARKETING



Leverage Destination Canada's efforts and build awareness and consideration for Ontario as a vacation destination through:

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| Consumer digital and social marketing | ⋮ | Content partnerships with key publishers and influencers |
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TRAVEL TRADE

Actively promote market-ready Ontario products and experiences to travel companies (tour operators and travel agents), and convert awareness to sales through:

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| In-Market Business-to-Business Sales Programs | ⋮ | Travel agent training with partners | ⋮ | Partnered Ontario Product Tours with representatives of travel companies | ⋮ | Joint Marketing Agreements | ⋮ | Pitching Ontario products at key trade shows and one-on-one meetings | ⋮ | Leverage Destination Canada's investment and activities |
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MEDIA RELATIONS



Enable positive editorial coverage to stimulate travel interest through earned media by:

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| Developing and maintaining close working relationships with key journalists, influencers, and targeted media outlets | ⋮ | Pitching stories at key events and one-on-one meetings | ⋮ | Providing visual assets and content | ⋮ | Partnered Ontario Product Tours | ⋮ | Leverage Destination Canada's investment and activities |
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